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ABSTRACT

Because of the aging of the labor force and legislation designed to keep older workers on the job, employers will have to deal with increasing numbers of older workers. For this transition to be as smooth as possible, employers must first overcome age-related stereotypes that have taken hold since the 1930s. Dealing with older workers involves two conflicting philosophies: that of "depreciation," which views the employee as an asset with a decreasingly productive work life, and that of "conservation," which sees a person's value to the organization as developing gradually and, if possible being maintained at a high level to the end of his or her career. Career management can be the first level of defense against three common problems: career burnout, plateauing, and obsolescence. Training needs can be identified by organizational analysis, task analysis, and personal needs analysis. Effective training and development programs can be designed by building long-range plans, reviewing performance appraisals, and surveying traning needs. Programs offered by companies may include scientific and technical training, management development, training for production and administrative employees, informal training approaches, and retirement preparation. Older employees need to be motivated by building their self-confidence. Instructional techniques include preparation of the learner, presentation of material, performance try-out, and follow-up. Challenges include designing effective performance appraisal systems, integrating career management, providing comprehensive training and development, offering tuition assistance, providing training information, offering alternatives to full retirement, and keeping employees posted on workplace expectations. (ABL)

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HOW TO TRAIN OLDER WORKERS

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HOW TO TRAIN OLDER WORKERS

Worker Equity Department
American Association of Retired Persons

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Preface

In today's world, American business is faced with the challenge of either maintaining a skilled and productive work force or losing out to the competition. Training employees to work at peak capacity is necessary for survival.

The need for training is complicated by demographics. The average age of the work force is increasing. The fastest-growing segment of the American population is in the group 35 to 44 years old, which has grown by 19 percent in the 1980's compared with an overall population growth rate of 4.2 percent. The population of those over 65 will increase from its current 12 percent to 20 percent by 2020 and the proportion of younger workers will decrease accordingly.

Figures like these tell us that much of tomorrow's training will have to be aimed at developing, preserving and renewing the skills and talents of middle-age and older workers. Training older workers is a new challenge for employers who must begin to address such concerns as:

- The best way to identify employees who need training and help with career development;
- How to motivate employees to take advantage of training programs;
- The flexibility and capacity of employees to learn new skills;
- How to modify training to accommodate employees with special needs; and
- The cost-effectiveness of training and employee development.

This booklet addresses these concerns. It is a practical guide to help you develop ways to train mid-career and older employees so they can work to their full potential.

The Older Worker Advantage

The day of fresh young workers annually replenishing labor's ranks is gone for the foreseeable future, a victim of the lower birth rates of the late 1960's and 70's. One result is a labor force that is growing older; in the 1990's the average employee will be 40 years old. A second and much more serious consequence is looming labor shortages, and these are already in evidence in such occupations as engineering and computer technology, and in such industries as health care and fast food services.

In the past, federal legislation encouraged early retirement as a means of opening job opportunities to younger workers. In recent years, however, with one eye on the rising pressures on income security programs and the other on approaching labor shortages, the Congress has reversed course, passing legislation designed to keep older workers on the job longer. Mandatory retirement is now prohibited in most occupations. The 1983 changes to the Social Security Act gradually increase the age of full eligibility from 65 to 67 over the next 20 years. And the 1986 amendments to the Age Discrimination in Employment Act require that employees who remain on the job past "normal" retirement age continue to accrue pension benefits.

The upshot of all this is that employers will have to deal with increasing numbers of older workers. For this transition to be as smooth as possible, employers must first overcome age-related stereotypes that have taken hold since the 1930's.

Myth: Older workers are less productive, efficient and motivated than younger workers.

Fact : Research shows that in most jobs productivity remains constant until well after the traditional retirement age.

Myth: Older workers are inflexible and resistant to change.

Fact : Research shows that such behavior is not related to age and that older workers want to keep their skills and knowledge current.

In fact, surveys of employers show that they see older workers as stable, reliable and careful, with high morale and strong commitment to the organization. Labor force studies show that workers between the ages of 50 and 60 stay on the job an average of 15 years and that their attendance rates are equal to or better than those of most other age groups. In most occupations, older workers also have lower on-the-job accident rates; workers 55 and older make up 13.6 percent of the work force but account for only 9.7 percent of on-the-job injuries.

Surveys of the older workers themselves show that they want to contribute fully to their organization.

Training is the most direct way of extending the productive careers of older workers. The challenge for managers is to make the fullest use of their talent and experience through counseling, training, development and career management and by creating a supportive climate.

Surveys of employers show that they see older workers as stable, reliable and careful, with high morale and strong commitment to the organization.

Two Conflicting Philosophies

There are two philosophies regarding employee's abilities — "depreciation" and "conservation."

The "depreciation" philosophy sees employees as assets with a decreasingly useful life. It assumes that a person's value to the organization peaks during his or her early career, plateaus at mid-career, and declines steadily thereafter. Investments in training and development beyond mid-career are not considered cost effective.

One of the flaws of this philosophy is that it ignores the high cost of employee turnover. Recruiting, selecting and training new employees is expensive, and the odds are good that a newly hired college graduate will leave the organization within five years.

The "conservation" philosophy sees a person's value to the organization developing gradually and, if properly managed, being maintained at a high level throughout the person's career.

This philosophy recognizes that a 50-year-old will probably stay with the organization for the remainder of his or her career. It favors investing in career planning, training and development for employees of all ages.

The Half-Life Effect

Many older employees suffer from what is called the *half-life effect*. Half-life effect, a term borrowed from nuclear physics, is the time it takes an employee to lose half of his or her competence because of changes in knowledge and technology. The half-life of information workers, engineers and scientists may be as short as five years.

In a rapidly changing business environment, obsolescence is costly and can lead to poor decisions, inferior products, alienated clients and demoralized employees. The psychological costs to an individual who feels outdated include insecurity, stress and the loss of self-esteem.

When such costs are multiplied by the number of employees whose skills and job knowledge have gradually declined, the cumulative costs to an organization can be staggering.

Three Common Problems

The mid-career and older employee faces three potentially serious problems that reduce productivity namely, career burnout, career plateauing and career obsolescence.

Problem 1: Career Burnout

Career burnout is caused by emotional and physical exhaustion. It is commonly found in jobs with intense pressures and limited support systems.

Some Solutions

Nip it in the bud. Look for excessive absenteeism, uncharacteristic poor attitude, disregard for the quality of work, and complaints about work overload. When burnout is diagnosed early, managers can take steps to prevent it from derailing careers. Some steps to take are:

- Job redesign or job rotation.
- Special temporary assignments.
- Reassignment as mentors or trainers.
- Stress management training.
- Sabbatical leaves.

Problem 2: Career Plateauing

Employees quit trying or let up when there is little probability of promotion.

Some Solutions

- Assign employees to projects that use their special skills.

Recruiting, selecting and training new employees is expensive, and the odds are good that a newly hired college graduate will leave the organization within five years.

- ○ Use performance appraisals to alert employees of problems on the job.
- ○ Provide alternative career paths.
- ○ Provide opportunities for training and development.
- ○ Set up a job posting and bidding system.

Problem 3: Career Obsolescence

Career obsolescence occurs when the skills and knowledge needed to do a job well have become outdated.

Some Solutions

- ○ Retrain to sharpen existing skills or teach new skills.
- ○ Encourage employees to become active in professional organizations.
- ○ Encourage employees to take courses to keep up with new developments.
- ○ Establish or upgrade a career planning and management system.
- ○ Encourage older employees to consider their career options and develop career contingency plans.
- ○ Hold career planning workshops.
- ○ Start a career information center.

In summary, the best way to minimize older employee career problems is to help them maintain their old skills and develop new ones.

Career obsolescence occurs when the skills and knowledge needed to do a job well have become outdated.

Career Management

Effective career management is the first line of defense against career burnout, plateauing and obsolescence. Unfortunately, until recently, managers have given it a low priority. Employers who neglect systematic career management risk underutilizing mid-career and older employees.

If you cannot answer the following questions you may need to give career planning and management greater consideration:

1. What organizational changes are likely to affect the way my unit, department or organization will operate in the next few years?
2. Which employees would benefit most from training and development to stay productive?
3. What are the career aspirations and personal development intentions of each employee in my department?
4. Are these career plans realistic, given the organization's plans?
5. How can I help my employees mesh their career aspirations with the company's long-term goals?

A growing number of employers recognize that company-wide career management pays dividends in employee commitment and productivity. Many companies are experimenting with multiple career paths, on-the-job development opportunities, career planning workshops, individual career counseling and mentor-protege relationships.

Effective career management also requires a cooperative effort between management, labor and older employees. A well-designed career management system allows for the full use of older employees' special skills, talents and experience, and encourages them to take responsibility for their own careers. This pays off for employers and employees.

Effective career management also requires a cooperative effort between management, labor, and older employees.

Determine Your Training Needs

There are three common and complimentary approaches to identifying training needs:

Organizational analysis. This approach focuses on company strategy. By examining sales forecasts and expected changes in production, distribution and support systems, employers can determine which skills will be needed and to what degree. A comparison with current skill levels is used to estimate staff and training needs.

In the past, managers who made these calculations could predict with reasonable accuracy how much training would be needed. Their estimates were based on the assumption that older employees would retire by age 62 or 65, as in many cases retirement was mandatory.

Mandatory retirement is now prohibited by federal law, but some managers still assume that most workers will retire in their early 60's or sooner. This picture is changing, and many employers already face the need to keep and train their older workers.

A serious consideration in analyzing training needs is the company's obligation to older employees. In many cases, older employees have invested most of their work lives with the company and they may have very limited job mobility. Their economic and psychological stake in the company goes well beyond the next paycheck. Employers' obligations to their long-service older employees can best be met by providing training opportunities that enable older employees to remain productive.

Younger employees note how older employees are treated. Their loyalty, as well as their morale, is affected by what they see.

Task analysis. This technique requires identifying the elements of current or future tasks to be done and developing a training program accordingly.

Personal needs analysis. A newer technique, this involves asking employees and managers, either in an interview or in a questionnaire, to analyze their training needs.

Research suggests that agreement between managers and employees tends to be low, so it is important that decisions about the training needs of older employees be agreed to by both parties.

Mandatory retirement is now prohibited by federal law, but some managers still assume that most workers will retire in their early 60's or sooner.

For an effective training and development program you need to assess your training and development needs and design training programs to meet those needs. Here are some of the ways employers do this:

1. Building Long-Range Plans. Managers regularly review the company's training and development needs. They estimate the mix of skills and experience needed in every unit and department to meet their goals and objectives. By comparing projected needs with information about each employee's performance, potential and career aspirations, managers identify employees who appear to have the motivation and ability for additional training and development.

2. Reviewing Performance Appraisals. Performance appraisals are an important source of information for training and development planning. Performance appraisals give early warnings of needs for skills upgrading or retraining. Alert managers use performance appraisal data to establish specific training requirements for individual employees, groups of employees or for entire departments. Early intervention with employees whose performance appraisals show a decline in productivity or quality often prevents more serious future performance problems.

3. Surveying Training Needs. Periodic surveys of the skill levels of executives, managers and employees are helpful, pinpointing special interests and problem areas. Surveys also enable employees to evaluate their own present and future training needs which in turn helps the company set training priorities.

Company executives meet with key department heads, project managers and union officials regularly to talk about training priorities. The objective of these surveys and meetings is to identify business trends and what they mean in terms of future training and development.

Resources for training and development are often limited. Some managers deal with this by considering suggestions for training and development programs, developing budget estimates for each program, assigning priorities and then implementing the programs expected to contribute most to short- and long-run organizational goals.

Some companies develop ongoing programs for scientific and technical employees, managers, administrators and production employees, and managers are always on the lookout for informal ways to teach and coach employees. The objectives are to prepare employees for promotion, counteract career burnout, help employees break through career plateaus, and combat managerial and technological obsolescence. Programs offered by some companies include:

1. Scientific and Technical Training. Scientists and engineers often find it particularly difficult to keep up with innovations and breakthroughs in their fields and particularly benefit from upgrading and retraining programs. They are also encouraged to participate actively in professional associations, with the employer paying for association dues, journal subscriptions and attendance at conferences and workshops.

2. Management Development. Another group often selected for development is managers. To deal with a diverse group of employees with a variety of technical specialties, managers must know the most up-to-date techniques for planning, goal setting, motivation and conflict management.

Management training and development takes a variety of forms. Some companies offer in-house workshops on current management issues, including stress management, negotiating and creative problem solving. Often, senior managers attend a longer management development

Surveys also enable employees to evaluate their own present and future training needs, which in turn helps the company set training priorities.

program with a special concentration on simulated planning. Companies also support and encourage managers to attend short courses offered through local university executive development divisions.

It makes sense to individualize management development, fitting training and development to the special needs of each manager. Many companies use a management-by-objectives system (MBO) for evaluating a manager's performance. In MBO, managers are required to establish not only job performance goals but goals for their own personal and career development. The achievement of personal and career goals is rewarded in the same way as the achievement of sales or manufacturing goals.

3. Training for Production and Administrative Employees. Many companies currently are phasing out some manual operations and replacing them with automated assembly processes. Employees who will be displaced in these phaseouts are sometimes given technical training for new jobs, or are given tuition assistance and a training stipend to attend evening programs at technical institutes.

4. Informal Training Approaches. Maintaining a productive work force often goes beyond formal training sessions. Informal training and development approaches in use include job rotation, internship programs and on-the-job coaching.

Age barriers often disappear in job rotation and internship assignments. Where this happens, you would be just as likely to find a senior employee collaborating with or working under the supervision of a young scientist, engineer or manager as to find a senior employee mentoring a junior colleague. Internships and temporary job assignments allow employees of all ages to add to their skills and knowledge, and to get exposure to new corporate problems.

Some companies maintain a library of books, cassettes, videos and computerized self-instructional materials to help employees keep up with new developments.

Each foreman, supervisor, manager and executive should expect to be an informal job coach for employees. By delegating challenging assignments and including key employees in participative decision-making, supervisors at every level can help to sharpen the skills and job knowledge of their employees.

5. Program to Prepare for Retirement. Programs can focus not only on retirement planning, but also on alternatives to total retirement and on post-retirement employment options and second-career opportunities. For example, some companies place retirees in a temporary help pool. Retirees who wish to work part-time give their availability and assignment preferences to the pool coordinator. Where necessary, refresher courses are offered to employees who have been away from the job for some time. Retired secretaries get training in word processing, and retired accountants take refresher courses in tax law. Retirees are also called on to fill in during vacation periods or to consult on special projects. Employees skilled in "critical need areas" are sometimes offered post-retirement, part-time jobs or consulting positions.

Here are some specific examples of companies that are doing creative training with their older workers.

General Electric in 1977 established a "Technical Renewal Program" for engineers whose skills needed updating. The program ran for three years and trained about 235 engineers. More than 70 percent moved to new assignments, and many others were able to work more effectively with co-workers. About half of the participants voluntarily continued to take

Some companies maintain a library of books, cassettes, videos and computerized self-instructional materials to help employees keep up with new developments.

courses offered by the department.

AT&T Bell Laboratories in New Jersey has a Continuing Education Program to encourage the personal growth and professional excellence of technical and administrative employees. Many of the program's highly specialized courses are not generally available in colleges and universities. A computer science series of six courses, each 15 weeks long, introduces older physicists and chemists to software technology.

Other courses range from short workshops to semester length. Self-paced instruction uses video and audio tapes and home study materials. All courses are pass/withdraw, with no record made of withdrawals. About 500 courses are offered yearly, with a total enrollment of about 12,000 employees.

These companies are in business to make money and they do. They have found that investing in the growth, development and maintenance of older workers pays dividends in productivity quality and commitment.

Other Sources of Information

Many other kinds of specialized training are available. Managers can find a good review in the book, "Developing and Training Resources in Organizations" by Wexley and Latham.

NOWIS

An excellent source of information on special programs for older workers is NOWIS, the National Older Workers Information System. It is a data bank developed by the University of Michigan and now maintained by AARP. NOWIS contains information on more than 100 older worker programs in the business sector. For information on NOWIS, contact AARP's Resource Center, 1909 K Street, N.W., Washington, D.C. 20049.

The U.S. Department of Labor (DOL)

Training assistance for older persons with limited incomes is available through two federal programs administered by the DOL. The Job Training Partnership Act (JTPA) and the Senior Community Service Employment Program (SCSEP). For information on these programs in your area contact the JTPA State Liaison in the Office of the Governor.

Private Industry Councils (PICS)

To train older workers for new jobs you can also investigate the possibility of assistance through local PICS, which work with JTPA funds. For further information contact the local PIC or the JTPA State Liaison in the Office of the Governor.

These companies have found that investing in the growth, development and maintenance of older workers pays dividends in productivity, quality and commitment.

Older employees may be less likely than younger employees to seek opportunities to learn new skills. They see training and development opportunities as mixed blessings. On the one hand, training development offers them a way to avoid career plateaus and to acquire skills. But on the other hand, training and development opportunities often stir up insecurities. They ask themselves:

- Is this training worth the time and trouble it will take?
- Can I master the new skills?
- Will I be the oldest person in the class?
- If I successfully complete the training how will I be rewarded? Will I be eligible for a promotion or a new job?

The ways to overcome those insecurities include:

- Explaining why the training is necessary.
- Linking training to valued rewards.
- Helping trainees extend their sense of self-responsibility to their own training needs.

Your objective is to create a win-win situation, where you and your employees agree that training or retraining pays off for both of you.

Building Self-Confidence

Even when older employees realize they need to learn new skills, they sometimes feel insecure about their ability to learn. They may not have been in a classroom for many years and they may fear that their learning abilities have become rusty. This is especially likely to happen when training focuses on skills that require learning complex patterns of eye-hand coordination, such as computer operations.

To address this, managers should focus on building trainees' self-confidence. It is important to understand that:

- Older learners see themselves as autonomous, self-directing and self-responsible.
- Older learners have unique and valuable *experience* which greatly influences their attitudes, interests, needs and desires. The trainer can increase their confidence by allowing and encouraging older trainees to use their skills in new learning situations, because new ideas and experiences can be given greater meaning when they are used to relate to and build on current experience.
- *Active* participation in the learning process allows the older trainee to share in the responsibility for the success of the learning experience.
- Training and rewards go together. If a trainee works hard and masters a skill, he or she must be rewarded or know that rewards are in the offing. If high performance training is not followed by rewards, the trainee is likely to become resentful and alienated.

Your objective is to create a win-win situation where you and your employees agree that training or retraining pays off for both of you.

Training Techniques

Here are some especially effective training techniques to use when working with older workers:
1. Have the trainees help plan the curriculum.
2. Work with each trainee to develop an evaluation process that will measure the extent to which his or her personal learning objectives have been accomplished.
3. Allow for participation and interaction among learners by using problem solving, case studies, role playing and practice sessions.
4. Relate new learning to the trainees' past experiences.
5. Help each trainee to transfer and translate current skills to the new skills being learned.
6. Provide audio and visual learning materials designed to compensate for any hearing and sight loss older persons might have. This is especially critical when using slide or taped presentation, videotapes, films or flipcharts.

- Be sure that there is no distracting background noise.
- Use good diction.
- Speak clearly at a lower range and a natural rate of speech.
- If there are hearing-impaired persons seat them up front where they can see the speaker's face.
- Use large, bold, dark print on flipcharts.
- Reduce glare.
- Keep a consistently high level of light on the screen when showing films, videos or slides.

Tips on Instruction Techniques

Here are a few practical ideas to guide you in instructing a new employee or a present worker on a new job or a new task.
FIRST, here's what you must do to get ready to teach a job.
1. Decide what the learner must be taught in order to do the job efficiently, safely, economically and intelligently.
2. Have the right tools, equipment, supplies and materials ready.
3. Have the work place properly arranged, just as the worker will be expected to keep it.
THEN, you can instruct the learner using the four basic steps:

Step 1 — Preparation (of the learner)

1. Put the learner at ease.
2. Find out what he or she already knows about the job.
3. Get him or her interested and desirous of learning the job.

Step 2 — Presentation

1. Tell, Show, Illustrate and Question in order to put over the new information and operations.
2. Instruct slowly, clearly, completely and patiently, one point at a time.
3. Check, question and repeat.
4. Make sure the learner really knows.

Step 3 — Performance Try-Out

1. Test the learner by having him or her perform the job.
2. Ask questions beginning with why, how, when or where.
3. Observe performance, correct errors and repeat instructions if necessary
4. Continue until you are sure that the learner knows.

Step 4 — Follow-Up

1. Put the learner on his or her own.
2. Check frequently to be sure the learner follows instructions.
3. Taper off extra supervision and close follow-up until the learner is qualified to work with normal supervision.

Remember — If the learner hasn't learned, the teacher hasn't taught.

Provide audio and visual learning materials designed to compensate for any hearing or sight loss older persons might have.

On-The-Job-Training

One way to teach specific job skills is the on-the-job training method (OJT) developed by the Training Within Industry program during World War II. OJT helps people incorporate new skills in a job or learn an entirely new job.

Trainers should recognize that some employees may want extra time to practice alone.

Behavior Modeling

Behavior Modeling is similar to OJT, and is among the most effective types of training. In behavior modeling, specific skills are demonstrated by the trainer or in a video. It differs from traditional training because it puts the emphasis on "how to" perform new skills rather than "why." It assumes that trainees will be more interested in the "why" after they have learned the "how."

In behavior modeling, the trainer typically performs the job flawlessly. However, watching a perfect job performance, particularly a complicated technical task, might intimidate some trainees. If a trainer shows some anxiety, makes a simple mistake, and then recovers and succeeds, it can increase the confidence of trainees that they can master the skill.

Setting Goals and Objectives

By asking questions the trainer can help older employees determine their training goals and objectives while not telling them what to do. Good questions can help trainees think through a problem. Some useful questions are:

1. What is your goal for learning the new computer system?
2. What problem will you work on first? When do you plan to complete it?
3. How will you know when you are ready to take on the new accounts?
4. Are there some benchmarks you can use to check your progress?
5. How will you reward yourself when you finish the course?

By asking questions the trainers can help older employees determine their training goals and objectives while not telling them what to do.

Checklist for Policy Makers And Managers

1. Design, implement and support an effective performance appraisal system.

- ○ Systematic, objective performance appraisals help identify such career problems as burnout, plateauing and obsolescence.

2. Integrate career management with organizational planning.

- ○ Examine how organizational changes may affect the need for skills;
- ○ Compare these needs with your skills inventory, performance appraisal information and the employees' career plans to make any changes that are needed; and
- ○ Survey managers and employees on their training and development needs.

3. Provide comprehensive programs for training and development based on a needs assessment.

- ○ Encourage skill development, retraining and career renewal training opportunities.
- ○ Provide in-service training.
- ○ Encourage and provide support to attend professional meetings.
- ○ Update training programs for technical people.
- ○ Adjust training and development programs to any special needs of older employees.
- ○ Reward employees who reach training and development goals.

4. Establish a tuition assistance plan for all employees.

5. Provide information about available seminars, workshops, training programs, professional journals and other resources.

6. Create alternatives to full retirement.

- ○ Part-time or temporary employment options;
- ○ Consulting or post-retirement employment;
- ○ Job sharing; and
- ○ Job redesign or transfer.

7. Develop an organizational climate sensitive to the problems and needs of older workers.

- ○ Sensitize managers to the pitfalls of age stereotyping. Train managers in coaching, counseling, listening, goal-setting, problem solving and career planning.

8. Keep employees posted on company plans and workplace expectations.

- ○ Older employees are a valuable asset, they bring to their job the experience of a lifetime. They are also reliable and tend to stay with their company rather than job hopping which makes investing in their training good business.

Systematic, objective performance appraisals help identify such career problems as burnout, plateauing and obsolescence.

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Many employers have found that older workers are a valuable resource. These employers have learned that it is ability, not age, that counts on the job. They are successfully using the experience of a lifetime.

AARP is the nation's largest organization of Americans age 50 and older. More than one-third of the members are working.

AARP is committed to expanding employment options for older workers. Its Worker Equity Department offers resources to employers interested in using the skills and experience of older workers. Among the resources available are:

- *Working Age*, a free newsletter highlighting employment trends;
- NOWIS, a data base of information about how more than 100 employers utilize older workers;
- Management guides and training manuals; and
- Worker education materials.

For more information on training older workers and other topics listed above, please contact:

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